



### *Peer Technical Assistance (TA) Summary*

<b>Requesting Agency:</b>	West Virginia Department of Health and Human Resources (DHHR), Division of Family Assistance
<b>Point of Contact (POC):</b>	Pam Mills
<b>POC Telephone No.:</b>	304-558-8290
<b>POC E-Mail Address:</b>	pammills@wvdhhr.org
<b>TA Event:</b>	118
<b>TA Requested:</b>	The State of West Virginia requested technical assistance in the form of a Stakeholders Forum to expand on knowledge surrounding the EITC from the initial Peer TA Event on the WV EITC Initiative Conference held in January 2005. The Forum was designed to move the statewide EITC agenda into action by increasing dialogue between participating agencies, community organizations, and volunteer groups regarding the 2006 tax season and to focus the statewide effort to build and expand community coalitions to make the EITC more accessible to low-income families and families leaving TANF in West Virginia.
<b>TA Goal:</b>	The WVDHHR's goal for the TA was to expand community outreach efforts across West Virginia for a focused EITC initiative to increase the quality of information being dispersed to clients.
<b>TA Format:</b>	Forum with the State Department of Health and Human Resources, Regional Community Action Agencies, Internal Revenue Service, the West Virginia Welfare Reform Coalition, and the West Virginia Extension Service.
<b>Sample Evaluations:</b>	<p>"This forum was very informative. I now have additional knowledge to help families to achieve another area of self-sufficiency."</p> <p>"Very helpful. Keep up the great work."</p> <p>"Great meeting."</p> <p>"Excellent program."</p> <p>"Most wonderful to see the First Lady involved and excited about supporting the EITC efforts."</p>

## **Analysis:**

The Earned Income Tax Credit (EITC) has been instrumental in closing the poverty gap for many of the nation's working poor. Enacted by Congress in 1975, the Federal EITC is a refundable tax credit that increases the income of low-and moderate-income working families by providing tax reductions and cash supplements. As a Federally-funded anti-poverty initiative, the primary purpose of the EITC is to help employed low wage earners maintain their financial self-sufficiency by offsetting taxes, supplementing wages, and making work more attractive than welfare. Widely praised for its success in supporting work and reducing poverty, the EITC has grown to be one of the most successful provisions of U.S. domestic policy. Several expansions in the late 1980's and early 1990's turned the EITC into the largest Federal aid program targeted to the working poor. The EITC provides some \$37 billion worth of assistance to almost 21 million low-income working families and is credited for lifting 5 million people out of poverty.<sup>1</sup> Despite the success of the program, research reveals that perhaps as many as "15% - 20% of tax filers eligible for the credit fail to claim it," leaving \$7 billion unclaimed in 2003.<sup>2</sup>

Recognizing these realities, West Virginia sought assistance from the Welfare Peer TA Network to move the statewide EITC initiative into action. Stakeholders around West Virginia have been working to develop a statewide EITC initiative to increase access for low-income families in rural areas by utilizing the strength of local coalitions. The Stakeholders Forum was attended by Federal and State agency staff, and local representatives from the various service regions in West Virginia. Local Community Action Agencies were represented, as was the WVU Extension Service, the WV Welfare Reform Coalition, and the WV EITC Coalition through the North Central CAA. Overall, the Forum was designed to facilitate the next steps for West Virginia in collaborating on a statewide plan for an effective EITC campaign for the tax year 2006.

The Forum included comprehensive information sharing related to the EITC. Highlights from the event included a speech from Mrs. Gayle Manchin, the First Lady of West Virginia, who has become an advocate and leader for the EITC initiative in West Virginia. Additionally, the leadership of West Virginia DHHR has largely spearheaded this initiative, and participants were excited to hear that new funding resources have become available for local agencies conducting EITC campaigns. Forum participants were offered presentations on the EITC outreach campaign, designed by the Welfare Reform Coalition, titled "Bounce Back," the IRS's perspective on conducting outreach in rural communities, and the promising practices from the North Central Community Action EITC Coalition. The afternoon session focused participants on collaborating to develop a work plan for the campaign and to address potential challenges surrounding a Statewide EITC campaign. The Forum added structure to the statewide agenda by leveraging partnerships for a contact in each Region to serve as a leader for the statewide effort.

Overall, participants, speakers, and facilitators agreed that the Forum was a success that helped to build the statewide and local capacity for West Virginia to organize local initiatives, access resources, and develop collaborative partnerships related to the EITC.

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<sup>1</sup> The National EITC Outreach Partnership, "The Earned Income Tax Credit—A Fact Sheet" July 2004 [www.centeronbudget.org/eitc-partnership/eitcfactsheet.htm](http://www.centeronbudget.org/eitc-partnership/eitcfactsheet.htm)

<sup>2</sup> Berube, A. & Tiffany, T. The "State Of Low -Wage Workers: How the EITC Benefits Urban and Rural Communities in the 50 States." The Brookings Institute, February 2004. P.3. <http://www.brookings.edu/eitcseries>